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Research News for the U.S. Travel Industry

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US Travel Data Center

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Woman Business Travelers Increase in 1990

The number of woman business travelers increased to 13.1 million in 1990, according to the U.S. Travel Data Center's *1990 Survey of Business Travelers*. The 8.5 percent increase over 1989 was the first increase in the number of woman business travelers since the survey began in 1986.

The report, which is sponsored by the Official Airline Guides (OAG), said that even though the number of woman business travelers increased, the number of trips they took decreased from 54.3 million trips in 1989 to 44.9 million trips in 1990. While, 37.4 percent of all business travelers are woman, they took just 28.9 percent of all business trips.

A total of 35.1 million U.S. adults took one or more business trips in 1990, a more than 1 percent increase over 1989. At the same time, these travelers took 8.3 percent fewer business trips than in 1989.

"Business travelers consolidated their trips more in 1990 in order to cut expenses," said Elizabeth Stewart, manager of market research at the Data Center.

There are significant differences between men and women who travel on business. The average female business traveler is 40 years old, two years older than her male counterpart. She is twice as likely to be divorced, separated or widowed and somewhat less likely to be a college graduate.

In addition, women business travelers are about as likely as men to be professionals or managers, but they are more likely to have a sales/clerical position. Median household income for woman business travelers is $30,000 - $40,000, while for men it's $40,000 - $50,000.

The majority of woman are "infrequent" business travelers, that is 1 to 2 business trips a year. Men are about twice as likely to take 10 or more trips annually.

Women are far more likely than men to attend a meeting, convention or trade show on a typical business trip. They also combine vacation with business travel slightly more often.

There are no great gender differences in terms of nights per trip, but a slightly larger percentage of men takes extended business trips. Men were also more likely to have visited their most recent destination at least once before during the year.

Women tended to use their own cars as their primary transportation on a typical business trip in 1990, while men were somewhat more likely to use other modes. In addition, women were less likely to stay in a hotel or motel and a little more likely to stay with friends and relatives.

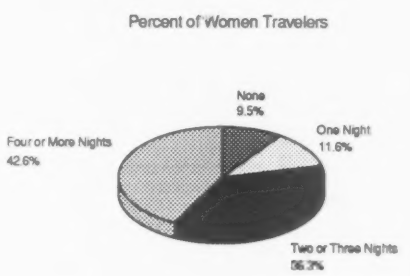
The most popular time of the year for woman business travelers to travel is the summer and autumn. October, June and July are the most popular months for woman business travelers.

The Survey of Business Travelers has tracked the growth characteristics of U.S. business travelers on a monthly and annual basis since 1986.

The SBT includes an overview of business travel, characteristics of business trips, a profile of business travelers, purpose of trips, modes of transportation and accommodations. Segments covered in the report include women business travelers, business car rentals, frequent travelers and airline travelers, among others.

The 1990 Survey of Business Travelers is available for $85 by contacting the Data Center at (202) 293-1040. *(Data Center members will be receiving a complimentary copy.)*

WOMEN BUSINESS TRAVELERS NIGHTS AWAY, 1990



Source: Survey of Business Travelers

INSIDE: 1992 Travel Outlook Forum Final Schedule; International Travel to U.S. Sustains Growth

Cost of Travel Increases Slightly in August

Even though the cost of travel in the United States increased for the third consecutive month in August, no component of the Travel Price Index increased more than 1.4 percent. The cost of travel in August increased 0.8 percent over the previous month and increased 5.0 percent over the past 12 months, according to the Data Center's latest (TPI).

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S. increased to 147.7 (1982 - 84 = 100) during August.

For comparison, the overall cost of goods and services Americans purchase, as measured by the Consumer Price Index (CPI), increased 0.3 percent in June and rose to 136.6.

Travel Price Index and Components

August 1991 TPI Component	Monthly % Change July 1991 to August 1991	Annual % Change August 1990 to August 1991
Transportation	0.9	0.3
Airline Fares	0.9	4.1
Other Intercity Trans.	-0.6	3.3
Intracity Public Trans.	0.1	3.8
Motor Fuel	1.1	-3.8
Lodging	1.4	10.1
Food and Beverages Away From Home	0.2	3.5
Entertainment	0.4	5.9
TRAVEL PRICE INDEX	0.8	5.0
CONSUMER PRICE INDEX	0.3	3.8

Source: U.S. Travel Data Center and the U.S. Bureau of Labor Statistics

Airline fares remained relatively stable increasing 0.9 percent in August. In the past 12 months, airline fares increased 4.1 percent. Overall transportation costs increased less than 1 percent in August after decreasing in June and July. Transportation costs increased only 0.3 percent over the past 12 months, the lowest annual percent increase in transportation costs since December 1988.

Motor fuel increased for the first time since May, increasing more than 1 percent. Over the past 12 months, however, motor fuel costs have decreased nearly 4 percent.

Entertainment costs increased in August, rising nearly 1 percent, and jumped more than 5 percent over the past 12 months. Intracity public transportation also showed an increase of less than 1 percent this past August.

The TPI indicates price changes in travel goods and services available to consumers in the U.S. and does not necessarily represent changes in the average fares, rates and other costs that travelers actually paid.

South Atlantic Region Remains Most Popular

The South Atlantic region again dominated as the most popular destination region in 1990, receiving more than 268 million person-trips, according to the Data Center's *1990 National Travel Survey Full-Year Report.*

The South Atlantic, which includes Delaware, District of Columbia, Florida, Georgia, Maryland, North and South Carolina, Virginia and West Virginia, accounted for 21 percent of all person-trips in 1990, while the East North Central was the next most popular region with 14 percent.

In addition, the South Atlantic led in attracting travel from outside its own boundaries, receiving 53.7 million more person-trips than it generated.

As for regions of travel origin, all but three Census Regions generated more travelers in 1990 than in 1989. The East North Central produced the most travelers with more than 222 million.

Among the information contained in the 1990 Travel Market Report are statistics on auto and air travel, hotel/motel use, travel by various age groups and a breakdown of vacation, pleasure, weekend and business travel by residents of the United States.

The statistics come from the Data Center's National Travel Survey, a monthly telephone survey of 1,500 U.S. adults. The report can be purchased for $165 by contacting the Data Center at (202) 293-1040. Proprietary custom questions may be added to the NTS and special tabulations of the data base are also available by contacting Elizabeth Stewart, manager of market research. *(Data Center members will be receiving a complimentary copy.)*

TRAVEL PRINTOUT is published monthly by the U.S. Travel Data Center, the national non-profit center for travel and tourism research and an affiliate of the Travel Industry Association of America, Two Lafayette Centre, 1133 21st Street, NW, Washington, D.C., 20036. (202) 293-1040.

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TRAVEL PRINTOUT reports on Data Center projects, national travel research conducted by other organizations and trends in the U.S. Travel Industry. Subscriptions are $75 per year; Foreign countries, $80 per year, payable in U.S. funds. ISSN: 0744-6233.

European Travel to U.S. Continues Growth

Despite the crisis conditions early in 1991, European travel to the United States showed a moderate increase, according to a United States Travel and Tourism Administration (USTTA) report, which was released at the Travel Industry Association of America's and USTTA's annual Discover America International Pow Wow - Europe.

Travel from Europe to the U.S. increased 3.8 percent during the first four months of the year, compared to 1990, outdistancing most other world markets.

USTTA said that January travel from Europe rose 0.6 percent over 1990, with 365,000 arrivals. Rapid growth was seen from Italy in January with 28,000 Italians traveling to the U.S., a 16 percent increase.

Travel dropped in February by 6.5 percent, because the Gulf War caused "the world to stop traveling."

European travel to the United States rebounded significantly in March, with a 13.6 percent increase. The greatest increases in travel to the U.S. were from: Spain (45.3 percent), Germany (29.8 percent), United Kingdom (17.9 percent) and Switzerland (11.1 percent). In April, travel from the major European markets showed a 3 percent rise over 1990.

Data Center Conducts Conference Survey

The Discover America International Pow Wow, the annual business meeting conducted by the Travel Industry Association of America (TIA) and the United States Travel and Tourism Administration (USTTA), will generate an estimated 9.6 million to 12.3 million international visitors to the United States during 1992 and 1993, according to a survey conducted by the U.S. Travel Data Center.

"The information provided by the Data Center's survey is a valuable resource in evaluating this event that is so important to our membership," said Susan L. Elms, senior vice president of marketing programs at the TIA.

Participants at the conference, held in Denver this past May, rated the overall value of Pow Wow quite favorably. In fact, the vast majority of both U.S. and international delegates (86 percent and 93 percent, respectively) gave the Pow Wow a rating of 4 or 5 on a scale from 1 (no value) to 5 (great value). Average ratings were 4.3 for U.S. delegates and 4.4 for international delegates.

Data Center surveys, such as the one conducted for TIA, are an excellent method of measuring the success of a conference or trade show, as well as assessing the satisfaction of delegates. "The Data Center has substantial experience in conducting evaluation research," said Suzanne D. Cook, executive director of the Data Center. "Such research is vital to the success of an organization operating in today's highly competitive conference market."

For additional information on the Data Center's capabilities in conducting conference research, contact Elizabeth Stewart, manager of market research, at (202) 293-1040.

Don't Forget

The Data Center now provides a free listing of all available publications. This in-depth guide lists all Data Center publications, in addition to reports from the United States Travel and Tourism Administration (USTTA), the European Travel Data Center (ETDC) and the reports from the Discover America 2000 series.

Through an agreement with the USTTA, reports such as the *In-flight Surveys*, the *Pleasure Travel Market to North America* and the *Summary and Analysis of Travel to the United States*, may now be purchased directly through the Data Center.

The publication guide also describes the Discover America 2000 Marketing Research Series. This series includes *Discover America 2000: The Implications of America's Changing Demographics and Attitudes on the U.S. Travel Industry* and the *Discover America 2000: The Mature Market*, commissioned by TIA.

If you would like a complete and free listing of domestic and international travel research reports available from the Data Center, call (202) 293-1040.

Visitor Volume at National Parks

Region	July 1991 visits	% Change from JULY 1990	Year to Date % Change 1991/90*
NEW ENGLAND	2,727,174	1.6%	0.5%
MIDDLE ATLANTIC	4,230,259	4.3	8.5
SOUTH ATLANTIC	11,214,826	0.9	-0.5
EAST SOUTH CENT.	3,422,493	45.2	13.1
EAST NORTH CENT.	1,396,037	12.9	10.4
WEST NORTH CENT.	2,753,166	12.7	8.0
WEST SOUTH CENT.	1,251,898	-1.5	-4.4
MOUNTAIN	8,101,300	8.5	1.6
PACIFIC	6,720,131	3.8	1.1
TOTAL	41,817,284	7.0	2.5

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

Census regions: New England: Conn., Maine, Mass., N.H., R.I., Vermont. Middle Atlantic: N.J., N.Y., Penn. S. Atlantic: Del., District of Columbia, Fla., Ga., Md., N.C., S.C., Va., W.Va. East South Central: Ala., Ky., Miss., Tenn. East North Central: Ill., Ind., Mich., Ohio, Wis. West North Central: Iowa, Kan., Minn., Mo., Neb., N.D., S.D. West South Central: Ark., La., Okla., Texas. Mountain: Ariz., Colo., Idaho, Mont., Nev., N.M., Utah, Wyo. Pacific: Alaska, Calif., Hawaii, Ore., Wash.

Current Travel Indicators - 1990/91

	Month	Value	Units	Percent Change Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)	July	$5,477	million	-12.8	2.7	2.1
Eating and Drinking Places(2)	Aug	$15,996	million	0.8	5.1	3.7
Gasoline Service Stations(2)	Aug	$10,713	million	1.0	-5.3	3.7
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	July	61.4	percent	-0.5	-1.3	-4.9
Real Demand for Commercial Lodging(4)	July	69.1	million	-1.3	3.0	0.1
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles	Aug	32.7	billion	4.5	-2.5	-3.0
Int'l Revenue Passenger-Miles	Aug	13.5	billion	10.2	3.2	-5.5
Highway Traffic Volume (6)						
Rural Arterial Passenger-Miles	July	51.6	billion	6.7	1.4	0.3
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles	July	604.5	million	4.7	2.5	3.3
Travel Price Index (1982 - 84 = 100) (8)	Aug	147.7		0.7	5.0	8.7
Visitor Volume at National Park Service Areas (11)						
Recreation Visits	July	41,817,284		25.3	7.0	2.5
Overnight Stays	July	3,718,645		37.6	10.5	5.2
Foreign Arrivals to the U.S.						
From Overseas(12)	Jan	1,005,282		-24.4	-0.2	-0.2
	Feb	795,111		-20.9	-14.0	-6.8
	March	1,120,929		40.9	1.1	-3.9
	April	1,123,811		0.3	2.3	-2.2
From Canada(13)	July	2,593,647		82.9	12.9	10.0
From Mexico(12)	Nov	98,133		11.8	12.8	7.8
	Dec	144,009		46.7	9.8	8.0
	Jan	73,033		-49.3	-9.2	-9.2
	Feb	65,508		-10.3	-9.9	-9.5
	March	125,220		91.1	45.8	10.3
	April	94,585		-24.5	-27.7	-3.1
U.S. Citizen Departures						
To Overseas(12)	Jan	N/A				
To Canada(13)	July	2,074,988		34.9	-1.1	-1.8
Domestic Demand for Gasoline						
Barrels/Day(14)	July	7,514	thousands	0.7	0.2	-1.1

(1) Source: Smith Travel Research, seasonally adjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted, 1986 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9) Source: U.S. Travel Data Center. (10) U.S. Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (13) Statistics Canada. (14) Preliminary. Source: U.S. Department of Energy

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